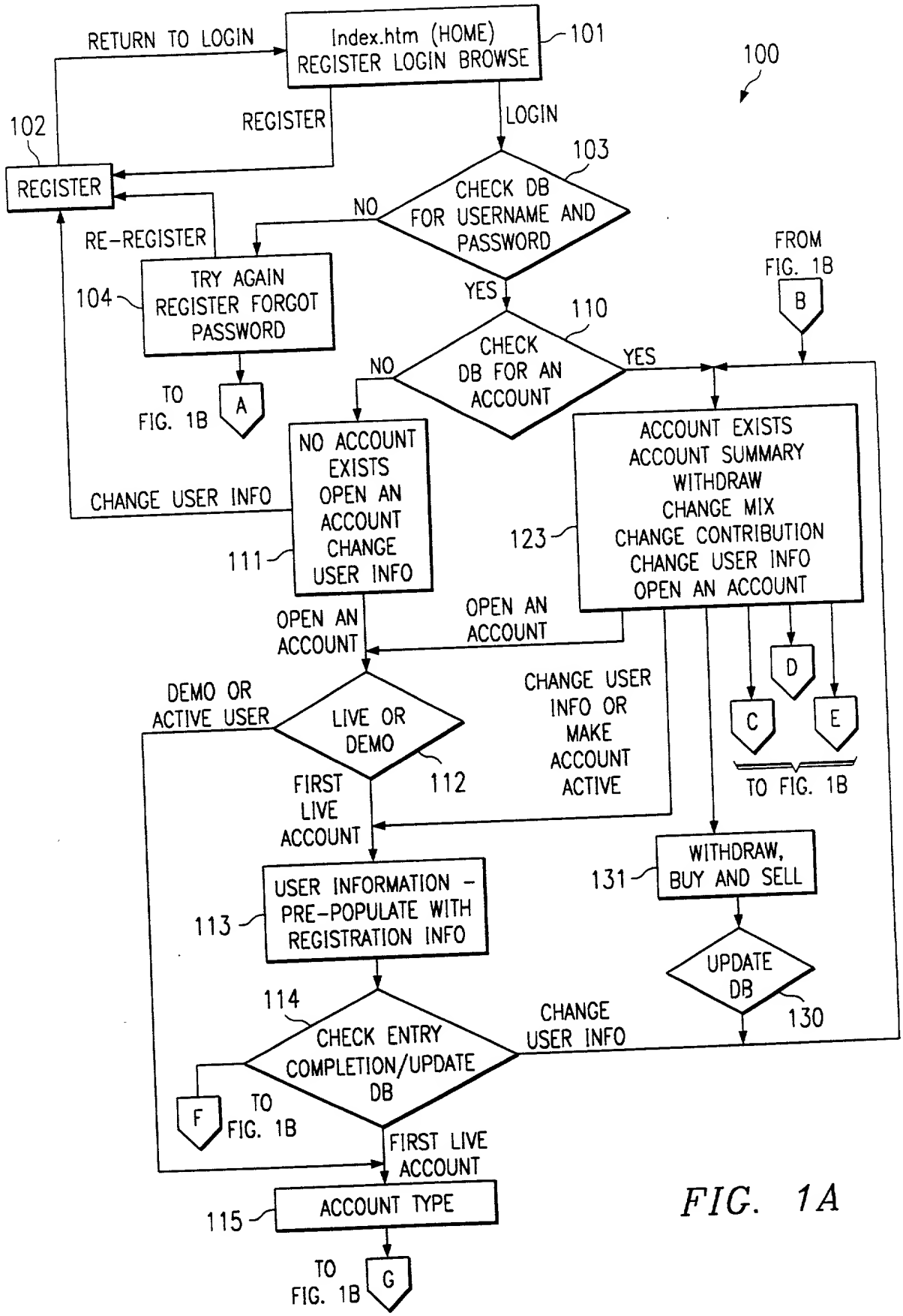
100
Index.htm (HOME)
REGISTER LOGIN BROWSE
101
RETURN TO LOGIN
REGISTER
LOGIN
102
REGISTER
103
CHECK DB FOR USERNAME AND PASSWORD
NO
YES
RE-REGISTER
TRY AGAIN REGISTER FORGOT PASSWORD
104
TO FIG. 1B
A
FROM FIG. 1B
B
110
CHECK DB FOR AN ACCOUNT
NO
YES
NO ACCOUNT EXISTS OPEN AN ACCOUNT CHANGE USER INFO
111
CHANGE USER INFO
ACCOUNT EXISTS ACCOUNT SUMMARY WITHDRAW CHANGE MIX CHANGE CONTRIBUTION CHANGE USER INFO OPEN AN ACCOUNT
123
OPEN AN ACCOUNT
OPEN AN ACCOUNT
D
C
E
TO FIG. 1B
DEMO OR ACTIVE USER
LIVE OR DEMO
112
CHANGE USER INFO OR MAKE ACCOUNT ACTIVE
FIRST LIVE ACCOUNT
WITHDRAW, BUY AND SELL
131
USER INFORMATION - PRE-POPULATE WITH REGISTRATION INFO
113
UPDATE DB
130
114
CHECK ENTRY COMPLETION/UPDATE DB
CHANGE USER INFO
F
TO FIG. 1B
FIRST LIVE ACCOUNT
ACCOUNT TYPE
115
TO FIG. 1B
G

FIG. 1A

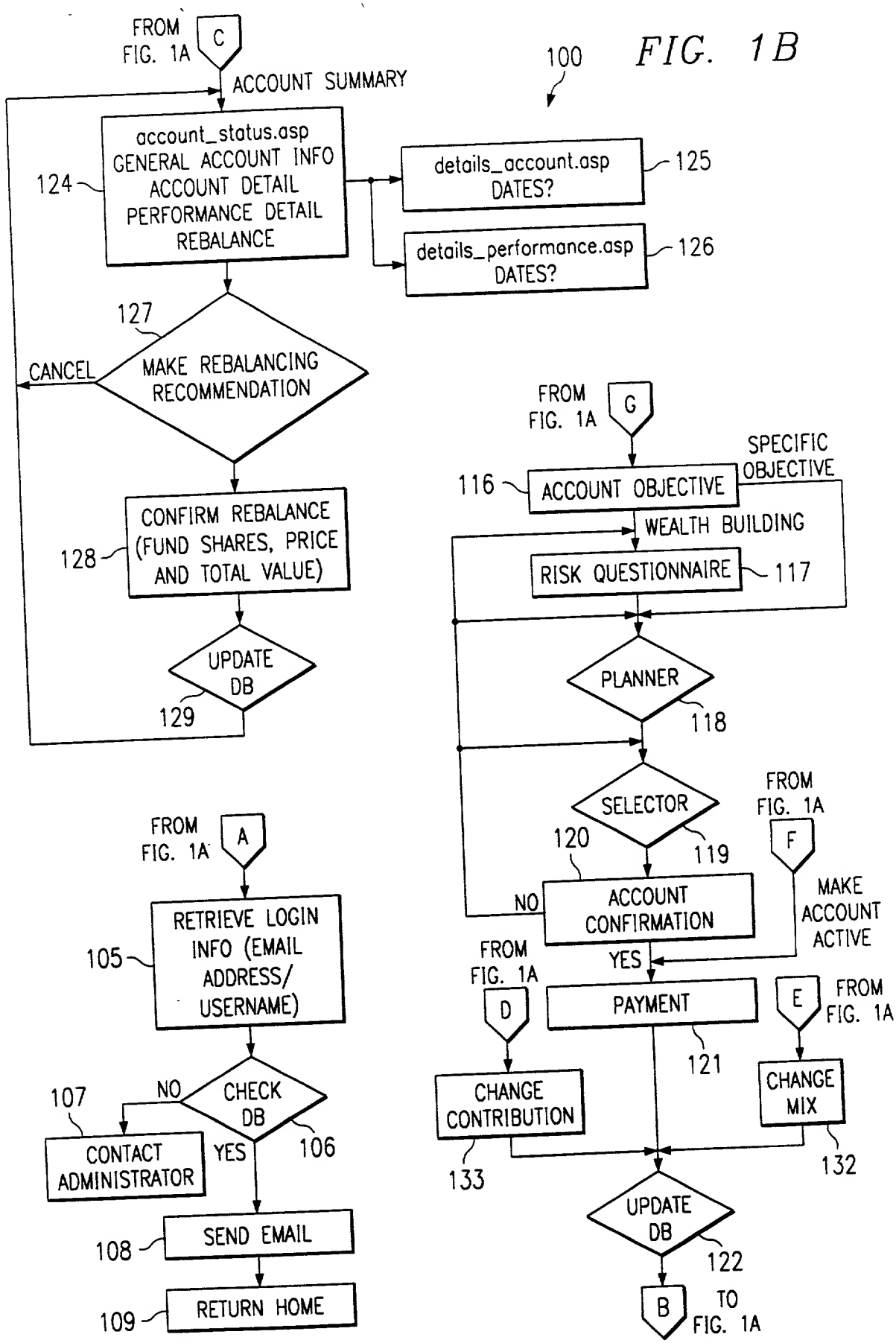
FROM FIG. 1A
C
ACCOUNT SUMMARY
100
account_status.asp
GENERAL ACCOUNT INFO
ACCOUNT DETAIL
PERFORMANCE DETAIL
REBALANCE
124
details_account.asp
DATES?
125
details_performance.asp
DATES?
126
127
CANCEL
MAKE REBALANCING RECOMMENDATION
CONFIRM REBALANCE (FUND SHARES, PRICE AND TOTAL VALUE)
128
UPDATE DB
129
FROM FIG. 1A
G
SPECIFIC OBJECTIVE
116
ACCOUNT OBJECTIVE
WEALTH BUILDING
RISK QUESTIONNAIRE
117
PLANNER
118
SELECTOR
120
119
FROM FIG. 1A
F
NO
ACCOUNT CONFIRMATION
MAKE ACCOUNT ACTIVE
YES
FROM FIG. 1A
D
PAYMENT
E
FROM FIG. 1A
121
CHANGE CONTRIBUTION
CHANGE MIX
133
132
UPDATE DB
122
B
TO FIG. 1A
FROM FIG. 1A
A
RETRIEVE LOGIN INFO (EMAIL ADDRESS/ USERNAME)
105
NO
CHECK DB
107
106
CONTACT ADMINISTRATOR
YES
SEND EMAIL
108
RETURN HOME
109

FIG. 1B

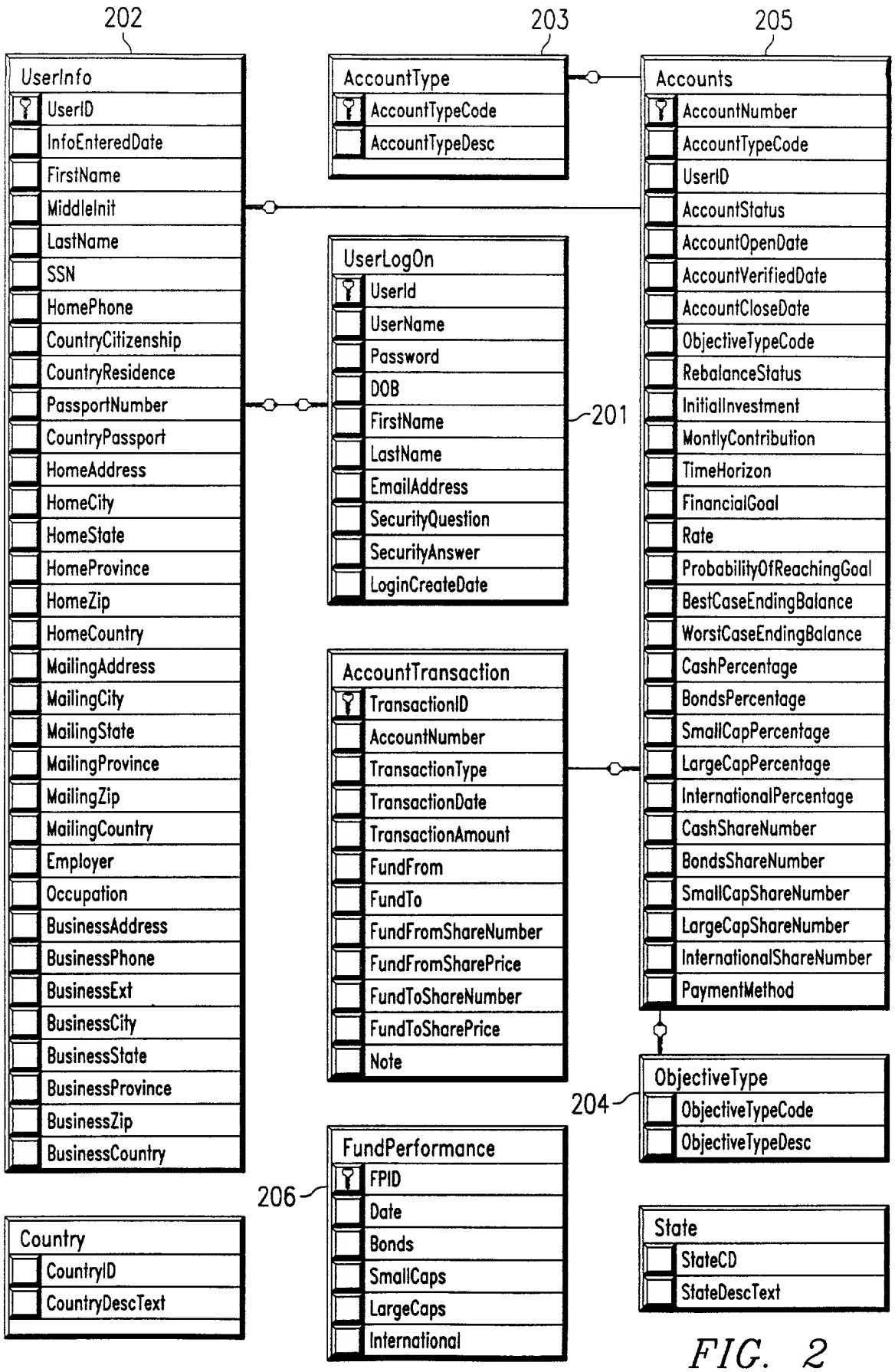
202
203
205
UserInfo
UserID
InfoEnteredDate
FirstName
MiddleInit
LastName
SSN
HomePhone
CountryCitizenship
CountryResidence
PassportNumber
CountryPassport
HomeAddress
HomeCity
HomeState
HomeProvince
HomeZip
HomeCountry
MailingAddress
MailingCity
MailingState
MailingProvince
MailingZip
MailingCountry
Employer
Occupation
BusinessAddress
BusinessPhone
BusinessExt
BusinessCity
BusinessState
BusinessProvince
BusinessZip
BusinessCountry
AccountType
AccountTypeCode
AccountTypeDesc
Accounts
AccountNumber
AccountTypeCode
UserID
AccountStatus
AccountOpenDate
AccountVerifiedDate
AccountCloseDate
ObjectiveTypeCode
RebalanceStatus
InitialInvestment
MontlyContribution
TimeHorizon
FinancialGoal
Rate
ProbabilityOfReachingGoal
BestCaseEndingBalance
WorstCaseEndingBalance
CashPercentage
BondsPercentage
SmallCapPercentage
LargeCapPercentage
InternationalPercentage
CashShareNumber
BondsShareNumber
SmallCapShareNumber
LargeCapShareNumber
InternationalShareNumber
PaymentMethod
UserLogOn
UserId
UserName
Password
DOB
FirstName
LastName
EmailAddress
SecurityQuestion
SecurityAnswer
LoginCreateDate
201
AccountTransaction
TransactionID
AccountNumber
TransactionType
TransactionDate
TransactionAmount
FundFrom
FundTo
FundFromShareNumber
FundFromSharePrice
FundToShareNumber
FundToSharePrice
Note
ObjectiveType
204
ObjectiveTypeCode
ObjectiveTypeDesc
FundPerformance
206
FPID
Date
Bonds
SmallCaps
LargeCaps
International
Country
CountryID
CountryDescText
State
StateCD
StateDescText

FIG. 2

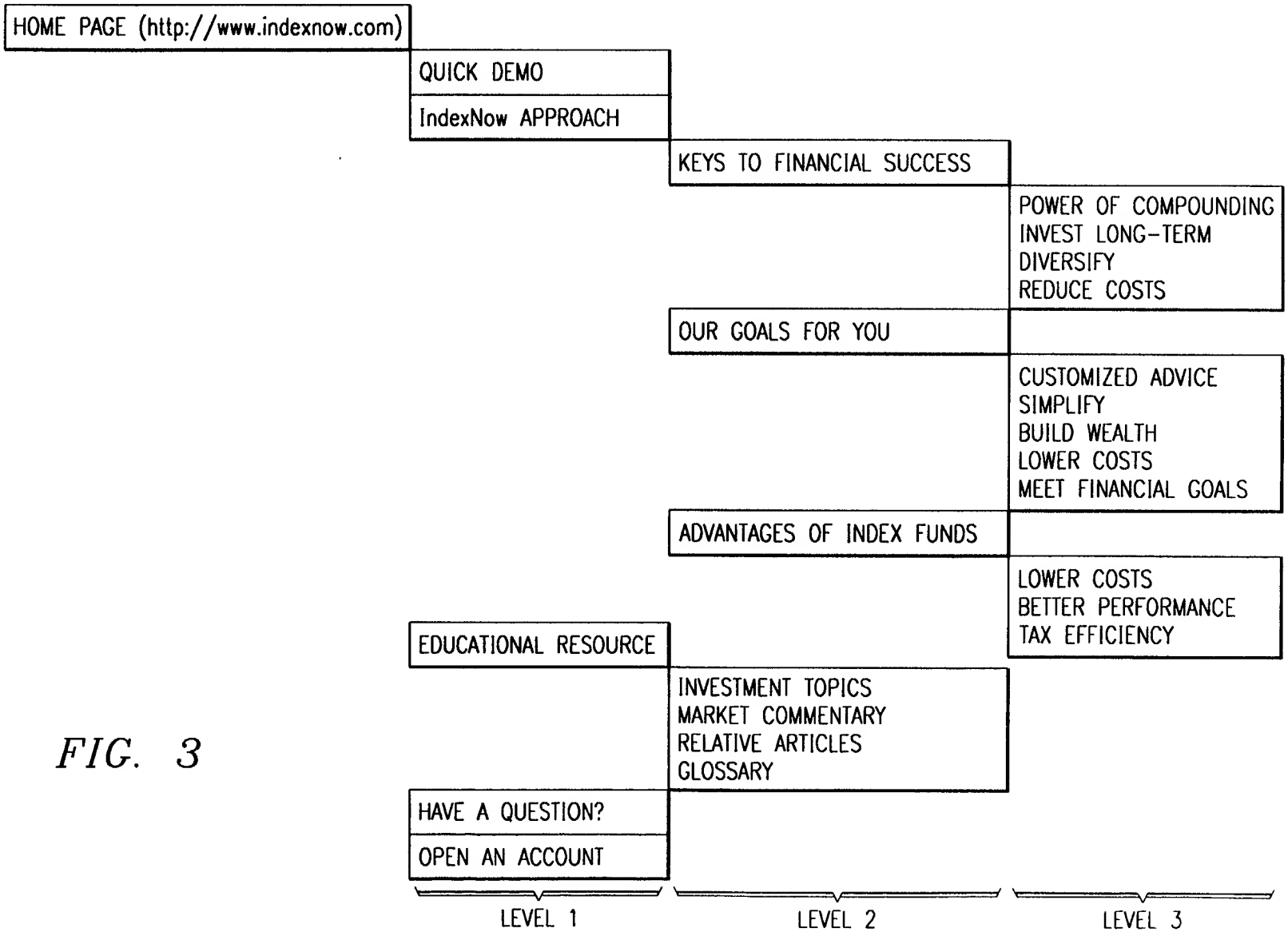
HOME PAGE (http://www.indexnow.com)
QUICK DEMO
IndexNow APPROACH
KEYS TO FINANCIAL SUCCESS
POWER OF COMPOUNDING
INVEST LONG-TERM
DIVERSIFY
REDUCE COSTS
OUR GOALS FOR YOU
CUSTOMIZED ADVICE
SIMPLIFY
BUILD WEALTH
LOWER COSTS
MEET FINANCIAL GOALS
ADVANTAGES OF INDEX FUNDS
LOWER COSTS
BETTER PERFORMANCE
TAX EFFICIENCY
EDUCATIONAL RESOURCE
INVESTMENT TOPICS
MARKET COMMENTARY
RELATIVE ARTICLES
GLOSSARY
HAVE A QUESTION?
OPEN AN ACCOUNT
LEVEL 1
LEVEL 2
LEVEL 3

FIG. 3

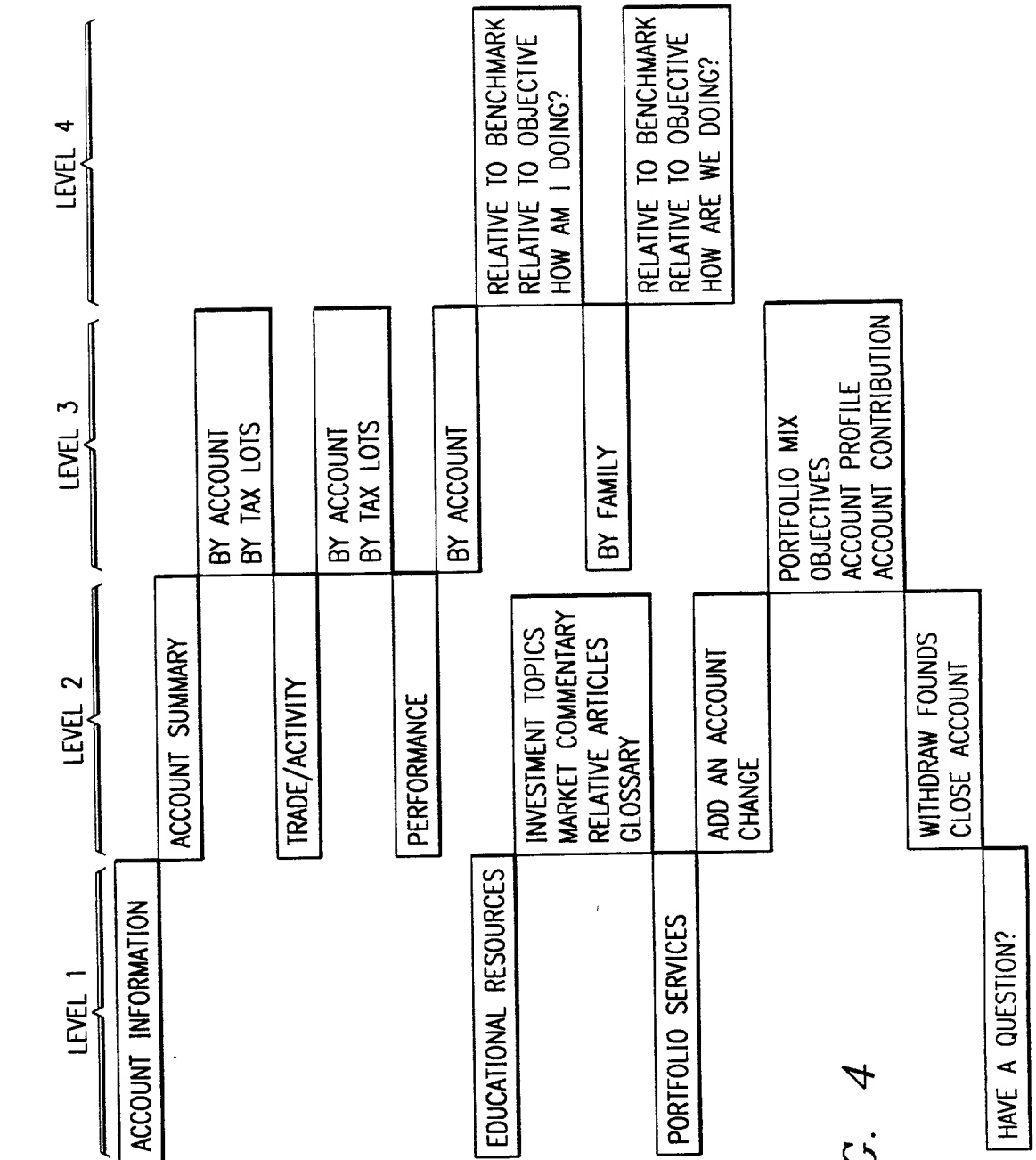
HOME PAGE
LOGIN/CLIENT HOME PAGE
ACCOUNT INFORMATION
ACCOUNT SUMMARY
BY ACCOUNT
BY TAX LOTS
TRADE/ACTIVITY
BY ACCOUNT
BY TAX LOTS
PERFORMANCE
BY ACCOUNT
RELATIVE TO BENCHMARK
RELATIVE TO OBJECTIVE
HOW AM I DOING?
BY FAMILY
RELATIVE TO BENCHMARK
RELATIVE TO OBJECTIVE
HOW ARE WE DOING?
EDUCATIONAL RESOURCES
INVESTMENT TOPICS
MARKET COMMENTARY
RELATIVE ARTICLES
GLOSSARY
PORTFOLIO SERVICES
ADD AN ACCOUNT
CHANGE
PORTFOLIO MIX
OBJECTIVES
ACCOUNT PROFILE
ACCOUNT CONTRIBUTION
WITHDRAW FOUNDS
CLOSE ACCOUNT
HAVE A QUESTION?
LEVEL 1
LEVEL 2
LEVEL 3
LEVEL 4

FIG. 4

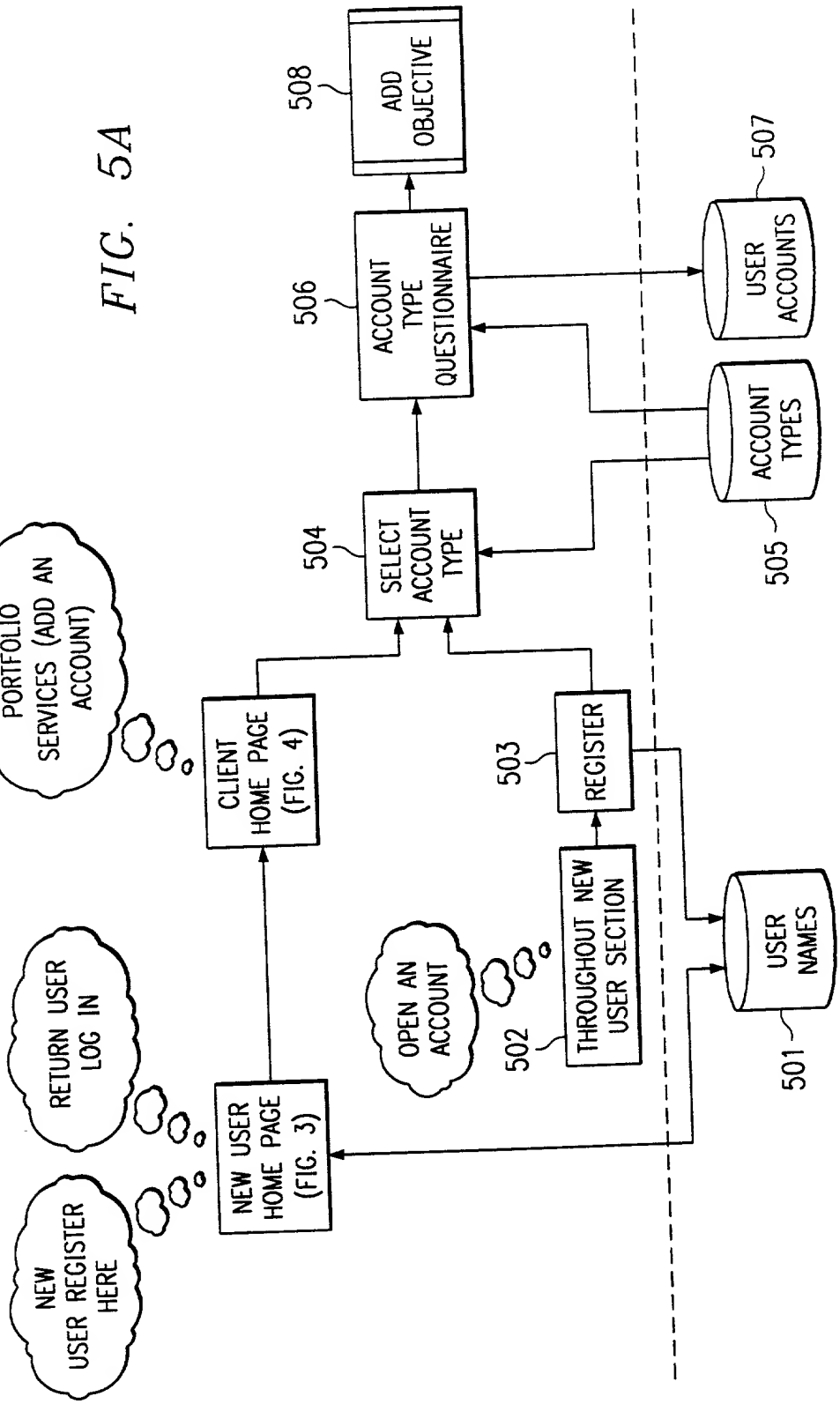
NEW USER REGISTER HERE
RETURN USER LOG IN
PORTFOLIO SERVICES (ADD AN ACCOUNT)
OPEN AN ACCOUNT
NEW USER HOME PAGE (FIG. 3)
CLIENT HOME PAGE (FIG. 4)
THROUGHOUT NEW USER SECTION
REGISTER
SELECT ACCOUNT TYPE
ACCOUNT TYPE QUESTIONNAIRE
ADD OBJECTIVE
USER NAMES
ACCOUNT TYPES
USER ACCOUNTS
501
502
503
504
505
506
507
508

FIG. 5A

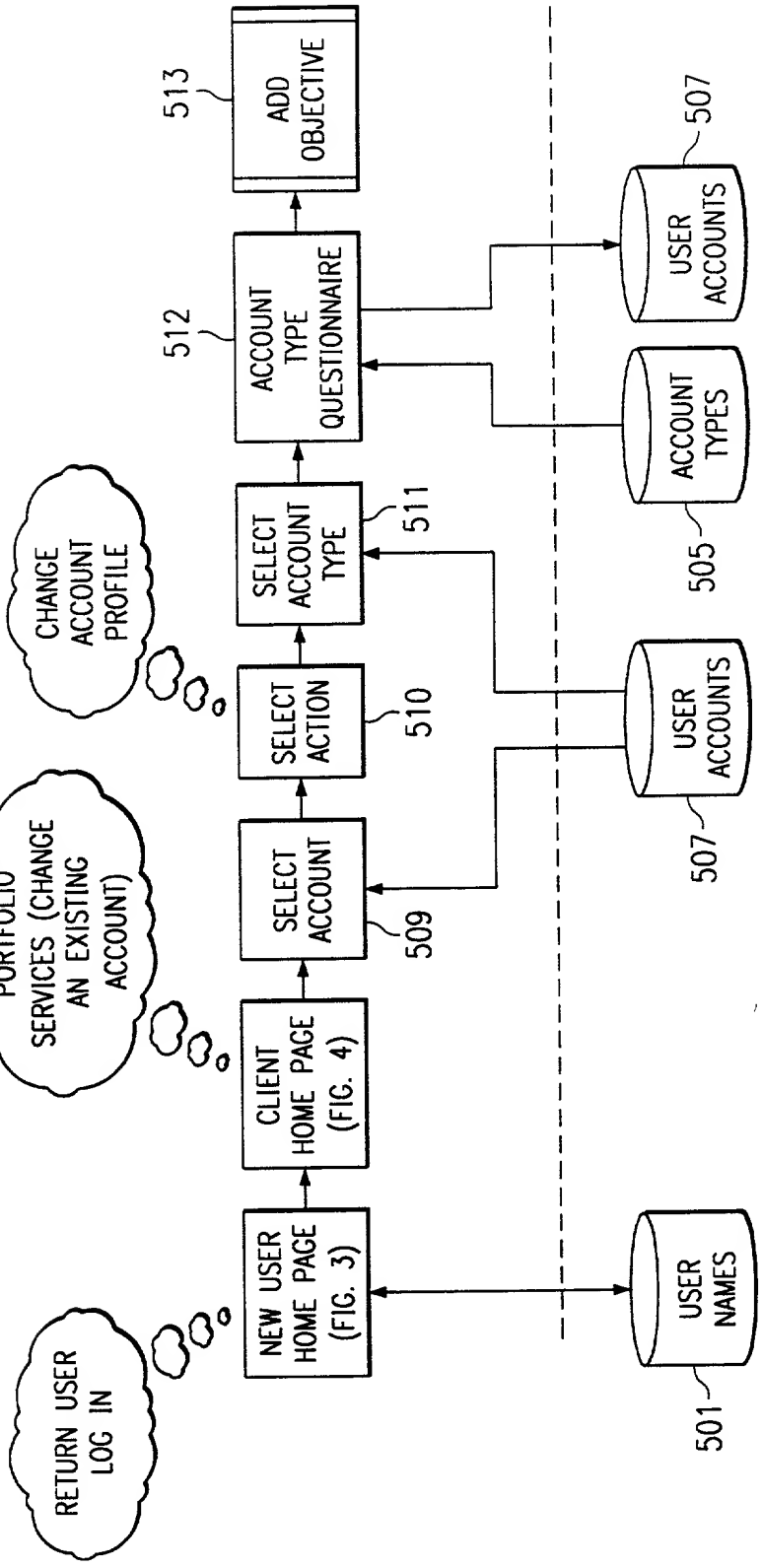
RETURN USER LOG IN
NEW USER HOME PAGE (FIG. 3)
CLIENT HOME PAGE (FIG. 4)
PORTFOLIO SERVICES (CHANGE AN EXISTING ACCOUNT)
SELECT ACCOUNT
509
CHANGE ACCOUNT PROFILE
SELECT ACTION
510
SELECT ACCOUNT TYPE
511
ACCOUNT TYPE QUESTIONNAIRE
512
ADD OBJECTIVE
513
USER NAMES
501
USER ACCOUNTS
507
ACCOUNT TYPES
505
USER ACCOUNTS
507

FIG. 5B

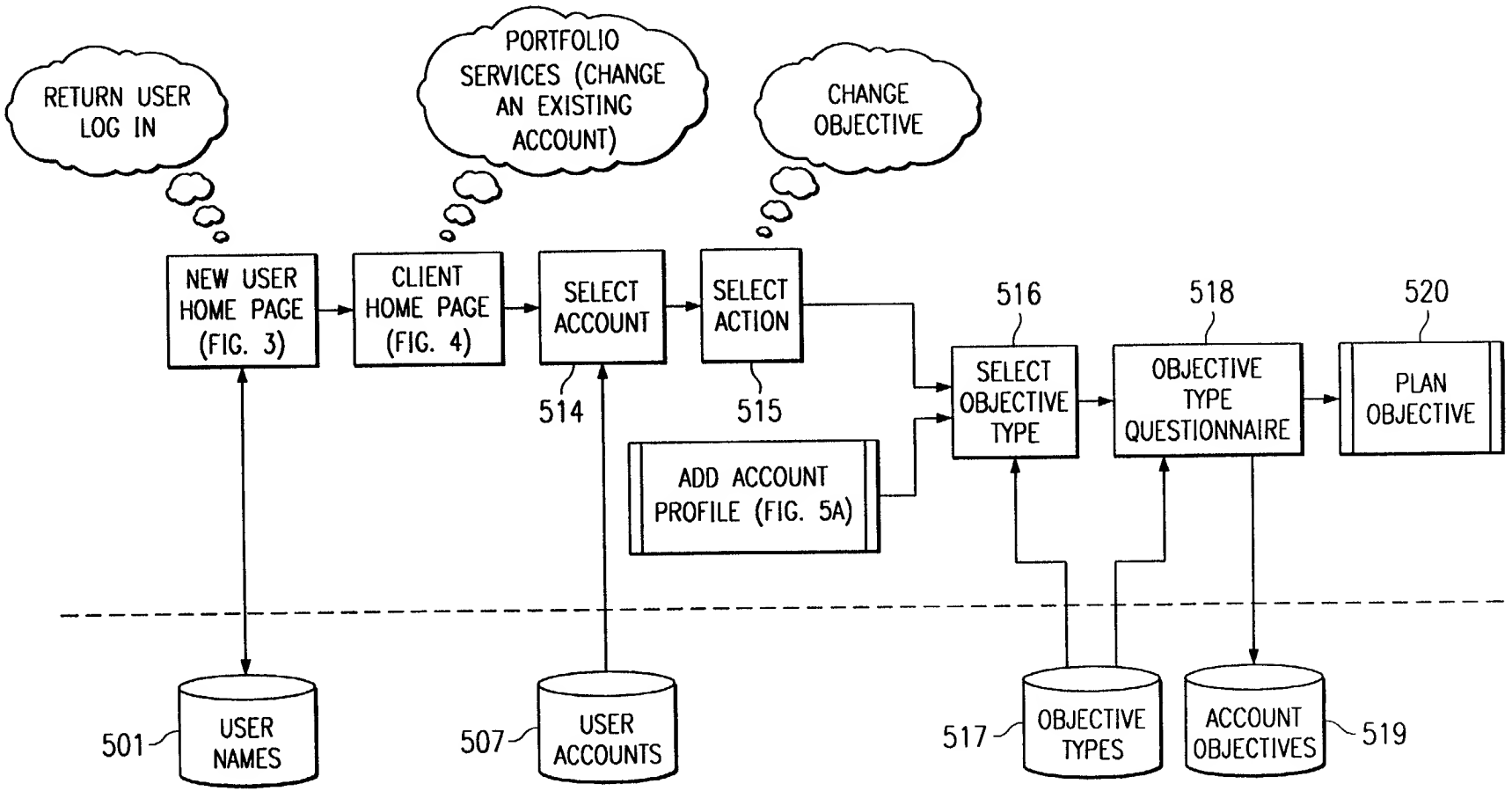
RETURN USER LOG IN
PORTFOLIO SERVICES (CHANGE AN EXISTING ACCOUNT)
CHANGE OBJECTIVE
NEW USER HOME PAGE (FIG. 3)
CLIENT HOME PAGE (FIG. 4)
SELECT ACCOUNT
SELECT ACTION
514
515
516
518
520
SELECT OBJECTIVE TYPE
OBJECTIVE TYPE QUESTIONNAIRE
PLAN OBJECTIVE
ADD ACCOUNT PROFILE (FIG. 5A)
501
USER NAMES
507
USER ACCOUNTS
517
OBJECTIVE TYPES
ACCOUNT OBJECTIVES
519

FIG. 5C

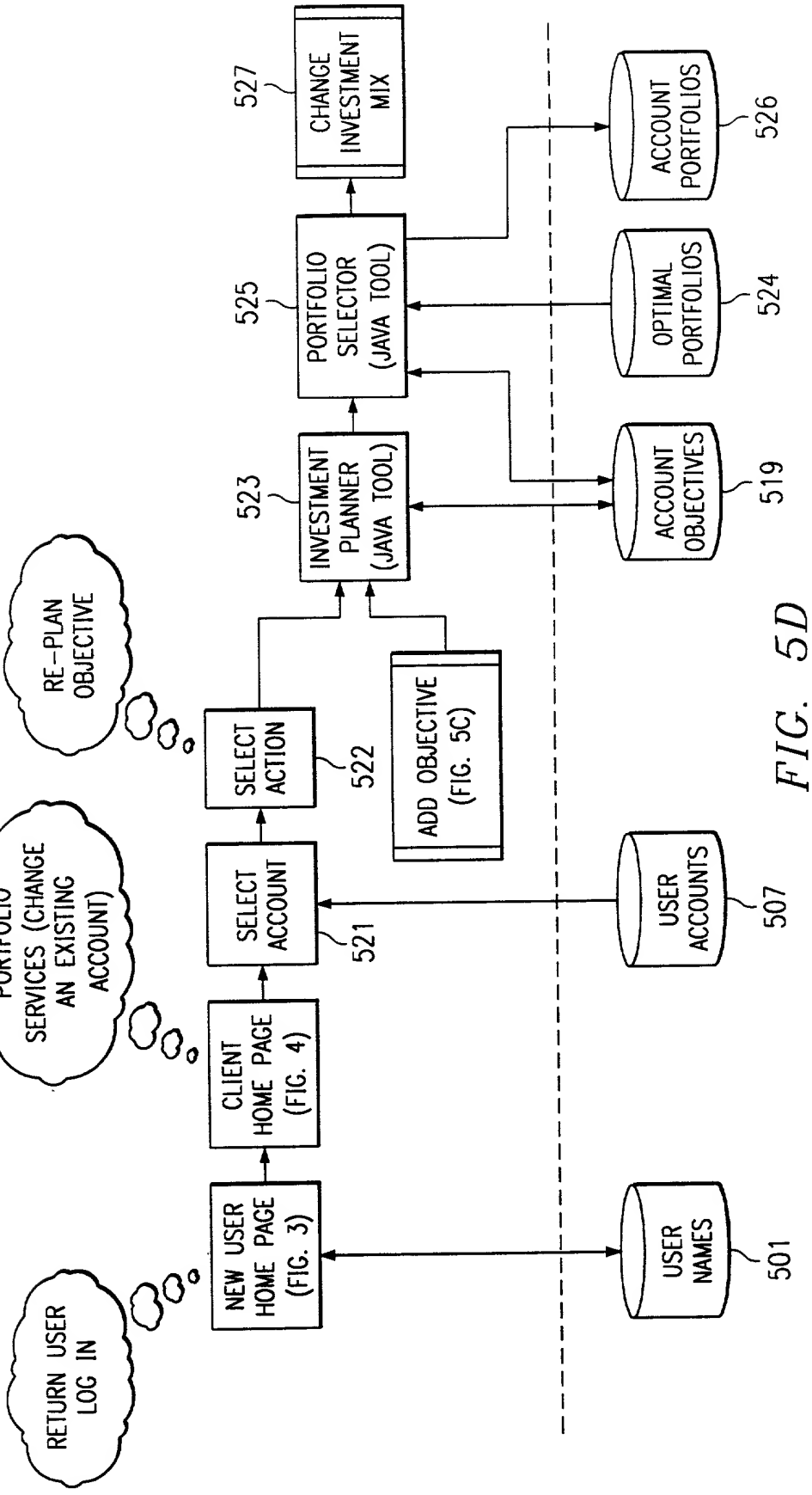
RETURN USER LOG IN
NEW USER HOME PAGE (FIG. 3)
CLIENT HOME PAGE (FIG. 4)
PORTFOLIO SERVICES (CHANGE AN EXISTING ACCOUNT)
SELECT ACCOUNT
521
SELECT ACTION
522
RE-PLAN OBJECTIVE
ADD OBJECTIVE (FIG. 5C)
INVESTMENT PLANNER (JAVA TOOL)
523
PORTFOLIO SELECTOR (JAVA TOOL)
525
CHANGE INVESTMENT MIX
527
USER NAMES
501
USER ACCOUNTS
507
ACCOUNT OBJECTIVES
519
OPTIMAL PORTFOLIOS
524
ACCOUNT PORTFOLIOS
526

FIG. 5D

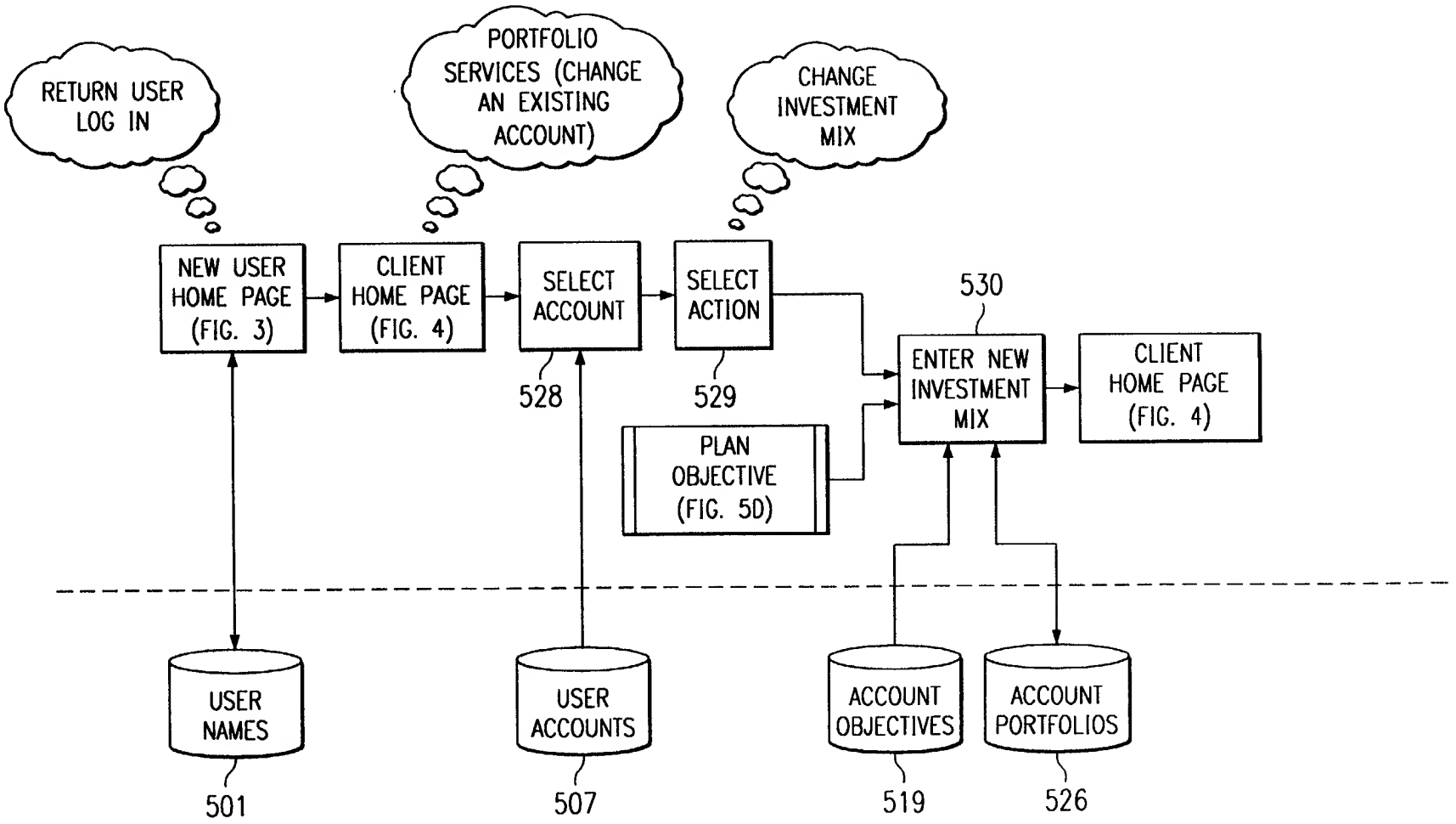
RETURN USER LOG IN
PORTFOLIO SERVICES (CHANGE AN EXISTING ACCOUNT)
CHANGE INVESTMENT MIX
NEW USER HOME PAGE (FIG. 3)
CLIENT HOME PAGE (FIG. 4)
SELECT ACCOUNT
SELECT ACTION
528
529
530
ENTER NEW INVESTMENT MIX
CLIENT HOME PAGE (FIG. 4)
PLAN OBJECTIVE (FIG. 5D)
USER NAMES
USER ACCOUNTS
ACCOUNT OBJECTIVES
ACCOUNT PORTFOLIOS
501
507
519
526

FIG. 5E